

**Accounting and Reporting Systems Section**

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Instructions for Downloading and Using OSHPD Hospital Annual Financial Pivot Table Profiles

Pivot Table Profile

The Excel pivot table is a powerful, yet simple-to-use, tool that allows you to view financial and utilization profiles for an individual hospital, a single aggregation of hospitals, or a complex aggregation of hospitals. The user determines the selection criteria and the pivot table produces the results. Users must have access to a computer with MS Excel (.xls).

Downloading a Pivot Table Profile

- If your computer has decompression software, download the WinZip.zip file.
 - If your computer does not have decompression software or if you are not sure, download the WinZip.exe file.
1. Right click on **WinZip.zip** or **WinZip.exe**.
 2. Select **Save Target As...** and save file to your Desktop. The file will be renamed HAFDCCYYpivot (with "CCYY" representing the year) and have either the .zip or .exe extension.
 3. From your Desktop, follow the instructions below for opening a Pivot Table Profile.

*Hint: You can open the Pivot Table Profile without downloading the file. Click on **WinZip.zip** or **WinZip.exe**, and then click **Open** or **Run**, respectively.*

Opening a Pivot Table Profile from Desktop

If you downloaded the WinZip.zip file -

1. Click on **HAFDCCYYpivot.zip**.
2. Click on **Excel pivot table (.xls)** file to open Pivot Profile.

If you downloaded the WinZip.exe file -

1. Click on **HAFDCCYYpivot .exe**.
2. Click **Run**.
Note: if you receive an Internet Security Warning, click on **Run** again.
3. Click on **Run WinZip**.
4. Click on **Excel pivot table (.xls)** file to open Pivot Profile.

Hint: After successfully opening the pivot table profile, save the file to your Desktop for future reference.



Contents of the Hospital Financial Pivot Table Profile

The Pivot Profile contains five worksheets (tabs) which function as follows:

Pivot	Use the Pivot worksheet to select your variables. The default setting is for all comparable hospitals statewide. Use the drop-down boxes (column B) to select an individual hospital, a simple aggregation (e.g., all hospitals located in Los Angeles county), or a complex aggregation (e.g., all non-profit hospitals in Los Angeles county that provide general acute care). The Profile and Charts worksheets will be automatically updated.
Profile	<p>The Profile worksheet displays individual or aggregate financial and utilization data based on your selection criteria and contains many formulas and links, so exercise caution if you make any changes.</p> <p>The profile includes beds and utilization data by type of care, an income statement, a balance sheet, financial ratios, uncompensated care calculations, revenue and utilization data by payer category, direct expenses by natural classification and cost center group, and labor productivity by employee classification.</p> <p>The characteristics of your profile are displayed in columns E/F, rows 35 to 47. To view a list of hospitals included in your profile, click on Retrieve Facility Names (column A, row 142).</p> <p>If an individual hospital is selected, additional information about that hospital is located in columns D/E, rows 148 to 172.</p> <p>The Profile is set to print the first three pages. To print the Profile with the list of facility names, you must re-designate the print area to include them.</p>
Charts	Three charts are displayed in the Charts worksheet showing gross and net revenue by payer, utilization by payer, and labor productivity. The charts are based on your selection criteria.
Data	The Data worksheet contains the data that are used to generate the Profile and Charts. The selected annual financial data files produced by OSHPD are used to create the pivot table database. Avoid changing the Data worksheet as it may affect the Profile and Charts.
Glossary	This is a glossary of each item included in the Profile and Charts worksheets.

Comparable vs. Non-Comparable Hospitals

Some hospitals have been granted modifications to the annual reporting requirements due to their unique operating characteristics. As a result, data from “non-comparable” hospitals are excluded from the default aggregations because including their data could result in inaccurate or misleading information.

Hint: To create a Pivot Profile for non-comparable hospitals, unhide row 1 of the Pivot worksheet and make your selection.

Below is a description of the hospital types and their reporting requirements:

Type of Hospital	Description
Comparable	This is the default selection for the pivot table and includes all hospitals that submitted a full annual financial disclosure report (i.e., without any reporting modifications).
Kaiser	By law, Kaiser Foundation Hospitals is allowed to submit consolidated financial statements for its Northern and Southern Regions and limited financial and payroll data for the individual hospitals located in those regions. Kaiser does not report gross revenue (charges) for services provided because they serve primarily healthplan members.
LTC Emphasis	These are large facilities that are licensed as general acute care hospitals, but primarily provide long-term care services. Due to their long lengths of stay, inclusion of their data could distort aggregate findings.
Other Non-Comparable	This category contains the Shriners Hospitals for Crippled Children, who provide free care to eligible patients, and those hospitals who are allowed to submit a short period modified report. These hospitals do not provide detailed revenue or expense data, or payroll information.
PHF	A Psychiatric Health Facility (PHF) is specially licensed to provide short-term acute psychiatric treatment. County-operated PHFs do not provide detailed revenue or expense data, or payroll information.
State	The hospitals operated by the California Department of Mental Health, Department of Developmental Services, and Department of Veteran’s Affairs, are allowed to submit limited financial and utilization data. State hospitals do not submit full financial statements, detailed revenue or expense data, or payroll information

Technical Assistance

Contact OSHPD’s Healthcare Information Resource Center at (916) 326-3802 or at hirc@oshpd.ca.gov if you have any questions.